

## CHAPTER 6

### POLL WORKER TRAINING

The goal of this chapter is to provide guidance to county elections officials for training of poll workers. The information provided in this chapter is intended as a starting point for county poll worker training programs and is not meant to take the place of county poll worker training materials or resources.

#### **Poll Worker Training – Federal Requirement**

Section 254(a) of the Help America Vote Act (“HAVA”), requires that the state prepare a HAVA state plan detailing what it will do to implement the new federal mandates, including a description of how each state will use HAVA Title II funds to educate elections officials and poll workers. California’s HAVA State Plan states:

“ensure that any training provided to poll workers cover at least the following topics:

- The proper operation and maintenance of voting systems and technology;
- The rights of voters to cast provisional ballots, the proper processing and counting of those ballots, and how provisional voters can determine whether their votes were counted and, if not, why not;
- The non-discriminatory application of HAVA’s identification requirements for certain voters who register by mail;
- Identifying and assisting voters with disabilities, including psychiatric disabilities, in order that such voters can participate fully in the voting process independently and privately;
- The rights of minority language voters in jurisdictions covered under Section 203 of the Voting Rights Act of 1965 to receive language assistance at the polling place” (*“My Vote Counts: The California Plan for Voting in the 21st Century”, page 20*).

#### **Poll Worker Training – State Requirement**

Senate Bill 610 (signed into law October 2003) added California Elections Code section 12309.5 to adopt uniform standards for the training of precinct board members (poll workers), based upon the recommendations of the Task Force on Uniform Poll Worker Training Standards created by the Secretary of State. The Task Force made its recommendations available for public review and comment prior to submitting their recommendations to the Secretary of State in 2005.

#### **Poll Worker Training Guidelines**

Poll Worker Training Guidelines were developed from the recommendations of the Task Force and can be found on-line at [www.ss.ca.gov](http://www.ss.ca.gov).

The subject of poll worker training is not so much a science as it is an art. The guidelines will be adapted, improved and supplemented in the future as lessons are learned from field experience and voting systems change in this constantly evolving field.

The guidelines are meant to establish a set of requirements which poll worker training sessions and materials should meet and to set a standard by which local programs should be measured.

### **Poll Worker Training Methods and Materials**

The goal of training is to ensure that poll workers are prepared to perform their duties correctly. Training sessions help them retain as much information as possible on Election Day. Studies have shown that poll workers, like all adult learners, learn best by short, interactive training sessions.

### **Suggested Practices**

Following is a list of suggested practices developed by the Task Force on useful methods and materials for poll worker training. The elections official should tailor these practices according to the needs of voters.

## **1. Ensuring the Rights of Those Seeking to Vote**

### **A. *Poll Workers Should be Aware of the Rights of Voters***

- *Poll workers should be instructed that before the polls open, they should connect and test any attachments to voting machines that provide accessibility to the disabled. (Some poll workers may then need to disconnect the attachments since some certified voting systems do not display anything on the screen if an audio device is attached.) Connecting and testing attachments allows poll workers to become familiar with the devices, and enables them to re-attach them quickly in the event they are needed.*
- *During training, it is often useful to have both a voter with a disability, and a voter with limited proficiency in English, relate to the class (either in person or via video) a prior bad experience trying to cast a vote. Hearing from someone directly can have a tremendous impact.*
- *Poll workers, bilingual or not, should be equipped with and trained to prominently display badges, nametags, stickers or ribbons identifying which languages they speak.*
- *Poll workers should understand that no matter what language a voter speaks, there are often simple ways to communicate effectively with the voter (e.g. hand signals, pantomimes, drawing pictures, etc.) if there is no one who speaks the voter's language.*
- *Role-playing is an effective technique to use in explaining to poll workers that they do not have to use English to explain to a voter how to vote. It is also an effective technique to make poll workers more comfortable dealing with voters with special needs.*

**B. Poll Workers Should Be Trained in Cultural Sensitivity**

- *Counties should provide one hotline dedicated to poll workers and one hotline designed for voters to receive assistance in various languages.*
- *Use role-playing in training to reinforce cultural sensitivity.*
- *Counties should broaden their poll worker recruitment to recruit workers who are diverse in age, ethnicity and language ability.*
- *Provide a customer feedback form for voters to comment on the experience at the polling place. Allow voters to turn it in at the polling place or mail it back to the county elections office.*

**C. Poll Workers Should Be Trained in How and When to Assist Voters with Disabilities or Any Specific Need**

- *Providing poll workers a demonstration or opportunity to actually sit in a wheelchair, enter a mock polling place blindfolded, or try to communicate with someone when they are only mouthing words, can give poll workers a much better understanding of the obstacle that voters with disabilities can face at a polling place if poll workers are not counseled in how to be sensitive and aware.*

**D. Poll Workers Should Know Exactly What Their Responsibilities and Authority Are and the Appropriate Limits Relating to Them**

- *Some counties designate a specific private phone line for poll workers to call if they need language or any other type of assistance.*
- *Poll workers should have printed cards with phone numbers and other contact information to give to voters.*
- *Roving inspectors should have an evaluation tool, like a checklist, to ensure that every polling place is following the rules regarding voting, including providing assistance to voters with disabilities or language challenges and using provisional ballots.*
- *Poll workers should have a written, laminated instruction sheet to give to poll watchers and they should be instructed to have a place designated for poll watchers to stand or sit.*

**2. Election Challenge Procedures**

- *If a disruption occurs, avoid direct confrontation. It is also best to move the parties involved outside and to a safe distance from the polling site so that the polling place can continue to process voters.*

- *Training for poll workers should include role-playing to provide poll workers with the chance to experience situations where they will have to confront challengeable behavior under different scenarios. This can also be done using a film or video to expose poll workers to various situations and have them see the appropriate responses.*

### **3. Operation of Voting Equipment**

- *There should be adequate machines in the training facility to ensure at least a 1:5 ratio of machines to poll worker students, enabling each student to receive adequate time learning to use the voting system.*
- *Poll workers often want to spend more time practicing how to use a voting system. Counties may wish to have additional optional workshops for poll workers, or have frequent “office hours” at several locations in the weeks before an election, so poll workers who feel tentative or uncomfortable with the system can come in and gain more experience assembling, dismantling, and operating the voting system.*

### **4. Preventing, Detecting and Addressing Problems with Voting Systems**

- *Training should include first hand observations of mock attempts to tamper with a system, either via video or through role-playing.*
- *Training should include a hands-on walk through of all of common issues. If poll workers might need to fix a problem on Election Day, then they should practice fixing that problem in training.*
- *If possible, training should include some role-playing or demonstration of unusual situations and how poll workers should observe and record the unusual events.*

### **5. Poll Hours**

- *Poll workers should be instructed to arrive at polling places before the polls open to give them adequate time to set up and ensure that polls are ready for operation promptly at 7 a.m. Allowing poll workers to practice setting up equipment can show them how long they will need for set-up so they can plan accordingly.*
- *Signs should be posted outside of polling places that provide information about what voters should do if their polling place is not open on time.*

### **6. Relevant Election Laws and Procedures**

- *Poll workers should be instructed to contact their county election office if they think they have a reason to challenge a voter’s eligibility.*
- *Training on ballot reconciliation, whether from a DRE printout or by counting paper ballots, is critical. Reconciling the numbers with the roster signatures is an important post-election procedure that seems to confuse many poll workers. Walking through it*

*during the training can help poll workers understand the importance of making sure they get the roster signatures right in the first place.*

- *Training materials should be designed in chronological order (i.e., the order in which poll workers will face the issue or task during Election Day) so that poll workers can easily find the answers to their questions.*
- *Language used in training materials should avoid technical, legal and system jargon. Simple words and phrases should be used, or if not, should be explained or defined several times, including a glossary of terms at the end of the materials.*

## **7. Procedures for Certain First-Time Voters, Provisional Voting, Absentee Voting, and other Miscellaneous Situations**

- *Poll workers should be trained to process and assist all voters with a customer service mentality in order to make their experience as positive as possible. Congratulating a first-time voter for voting also sends a positive message*
- *Place a sign or placard near the roster informing voters, and reminding poll workers, that voter's have the right to request a provisional ballot if their name is not on the roster and poll workers must provide a provisional ballot to people who request one.*
- *Counties should review the performance of each poll worker's performance with a post-election survey of their fellow poll workers. Poll workers should be evaluated on key areas so that they can improve based on feedback on their performance, and so counties can remove poor workers and reallocate the best workers to serve in the busiest precincts or to become troubleshooters.*
- *Poll workers should be instructed to minimize voter confusion by checking to confirm they are providing the correct sample ballots and ballots to voters, particularly those voters casting provisional ballots.*
- *Counties should review the performance of each poll worker's performance with a post-election survey of their fellow poll workers. Poll workers should be evaluated on key areas so that they can improve based on feedback on their performance, and so counties can remove poor workers and reallocate the best workers to serve in the busiest precincts or to become troubleshooters.*